



# Financial Systems Business Process

Process Name

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Created by: Accounts Receivable  
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Owner: Business Solutions – AR  
Revision N/A  
Date(s):

<b>Name</b>	AR_027_Customer Labels Report
<b>Introduction</b>	The purpose of this process is to provide business units with the ability to print mailing labels for customers. The output of this process is a Crystal report designed to create customer mailing labels. This process alleviates the business unit from typing their own labels or envelopes, or from ordering customized window envelopes to fit customer addresses from statements. It also enables the user to select the Aging ID and Categories to choose customers based on the time elapsed since customers have been billed. The Aging IDs and Categories are as follows: 01=0-30 days (current), 03=31-60 days, 04=61-90 days, 05=91-120 days and 06=120+ days.
<b>Process</b>	This process may reduce the amount of time the business unit spends preparing labels or envelopes for customers. <b>The business units will need to order Avery Labels #5162, size 4" x 1¼".</b>
	<ul style="list-style-type: none"> <li>- <b><u>Navigate to:</u></b></li> <li>- Go-Manage Sales Activities-Collect Receivables -Report-Order AR Labels-Add</li> </ul>
	<ul style="list-style-type: none"> <li>- <b><u>Create a Run Control</u></b></li> <li>- Enter Run Control and click "OK".</li> </ul>
	<ul style="list-style-type: none"> <li>- <b><u>Select a Business Unit</u></b></li> <li>- Enter a "Business Unit".</li> </ul>
	<ul style="list-style-type: none"> <li>- <b><u>Select Aging Category</u></b></li> <li>- Tab to "Aging Category", click the "down" arrow to select Aging ID. Tab out of "Aging Category" field to view elapsed time.</li> </ul>
	<ul style="list-style-type: none"> <li>- <b><u>Select the Statement Group</u></b></li> <li>- Choose a "Statement Group" (most business units will select "All Statement Groups").</li> </ul>
	<ul style="list-style-type: none"> <li>- <b><u>Save</u></b></li> <li>- Save and click "Run" process (traffic light).</li> </ul>

	<ul style="list-style-type: none"><li>- <b><u>Select Run Location and Output Destination</u></b></li><li>- On the Process Scheduler Request, select "Client" as the Run Location and "Window" as the Output Destination and click "OK".</li></ul>
	<ul style="list-style-type: none"><li>- <b><u>View Customer Label Report</u></b></li><li>- The customer label report will populate the window (The list will show the customer, address and customer id).</li></ul>
	<ul style="list-style-type: none"><li>- <b><u>Print Customer Label Report</u></b></li><li>- Place labels in printer, and</li><li>- Click the "Printer" icon and select the number of copies to print and click "OK".</li></ul>
<b>Risks/Cautions</b>	<ul style="list-style-type: none"><li>- If the incorrect size labels are used, the labels may be misaligned.</li></ul>
<b>References</b>	<ul style="list-style-type: none"><li>- N/A</li></ul>
<b>Contact</b>	<ul style="list-style-type: none"><li>- Business Units may contact the Helpdesk at (404) 657-3956 or (888) 896-7771 for additional help or information.</li></ul>